Morning Huddle – Again

Did you give up on morning huddles? Give it a second chance.

I just about lost it – again – during our pathetic, ridiculous, unproductive, disgusting excuse for a huddle.

I never really get angry in the office, but the huddle thing just kills me. Charts are supposed to be prepped, hygiene is supposed to verify X-rays are up-to-date, perio charting, see if there’s any outstanding treatments that need to be discussed with the patients, medical history updates, etc.

Assistants are supposed to do the same.
The front desk is supposed to go over yesterday, discuss any needed follow-ups and the whole thing is supposed to follow a YT2 (yesterday, today, tomorrow) format.

Does it?
No!
And it never did.
Does anyone have a productive huddle in the morning?
How do you do it? ■ Steven

Steven, I have attached a clinical assessment form that I have made up for the offices I consult in. It’s unfortunate but I have found that some hygienists tend to be lazy and not hold up their end of patient care assessment, which helps the dentist to stay consistent and proficient day in and day out.

I hope this helps to organize your patient assessments in hygiene!

[Editor’s note: Visit the message board online to view the attached clinical assessment form.] ■

Forget the morning huddle... Fire someone not doing their job and watch what happens.

I tried a morning huddle for about a week a long time ago. Waste of time in my opinion. If after being trained and working for six months, my staff doesn’t know what to do, how to do it, etc. to make the office run smoothly and make my life easier, a morning huddle won’t help. ■

Steven, is any of this written down? It sounds like it is time for a checklist. I’m assuming there is currently no accountability for this long list of “supposed-tos.” If it is written down, they have something visual to see, and know that it is expected. This is a lot more effective than a routine that takes place out of tradition. ■

I think the morning huddle is a bunch of BS. I have a big staff that come in anywhere from 6:30 a.m. to 7:30 a.m. so we couldn’t do one anyway. Our review is at the end of the day for the next day and doesn’t require everyone knowing everyone’s...
business. The staff members coordinate what they need to with the appropriate people. We don’t stand around in a circle singing Kumbaya.

I think if you are having this meeting and it’s not effective, you need to look in the mirror. You are not leading well. We spend seven to eight minutes going over the schedule and I think it is beneficial.

It keeps you from getting blindsided on things like “Hey Mr. Smith, how’s your husband doing?” And Mr. Smith died a month ago.

Or Suzy Soccer mom’s kid got a scholarship in synchronized underwater basket weaving and she’s very proud of it and you can congratulate her and you look like a rock star.

Or Mr. Jones needs an FMX and you have that NTI seat at the same time, can someone in the front come back and push the button for me so we get it done faster... and stay on time?

Or Bill has that fractured cusp on #3 and he knows he needs a crown but he’s been out of work for a year and he wants to keep an eye on it. Bill gets pissed when you keep overstating the obvious. Bill thinks you are a cool dude when you ask him how the job prospects are going and that we’ll keep watching that tooth and we can put a band aid on it to get him by if necessary.

Depends on what type of office you want to have or are comfortable with. Do you want a bunch of independents running around, or do you want a cohesive team-oriented vibe?

When you have good systems you don’t have to micromanage anything. Huddles should last no longer than 10 minutes.

Staff comes prepared with data. The doctor doesn’t have to do anything. The staff report to the doctor. If they don’t come with the data, they go get it and come right back while the huddle continues.

We have four hygienists, four assistants, three front office and two docs (one is my wife).

Our huddle is a little long in the tooth. 15 minutes easy.

Yes, hygiene drags their feet but every day we discover some way to head off trouble, reroute the schedule, perform same day treatment and sing Kumbaya.

We’ve had a huddle every morning for about six years. I think we got the format idea from Sandy and Dr. Westerman.
Front office goes first and reports: yesterday’s production, yesterday’s collection, today’s scheduled production, lists any new patients coming in and relevant info about them, where they intend to place any emergencies that call (I find this very important and might offer my suggestions) and anyone coming in with large account balances.

Back office reports premeds and allergies (latex), confirms all lab cases are in and addresses any inconsistencies in the schedule that do not match what is listed in the chart.

Hygiene (two hygienists) lists teeth we are monitoring for crowns on each patient (these are teeth they are supposed to show with the intra-oral camera), note any FM Xs needed, premeds, allergies, etc.

Sterilization tech (who now acts as my second assistant) announces all the hygiene patients who need probe readings; she will help hygiene with those readings (we alternate between probes and X-rays every six months).

And that’s it. I generally sit there nodding and saying that sounds good. I don’t want a lot of adlibbing or going off script. The whole thing usually lasts about five or six minutes. On rare occasion, I’ve had an employee announce at the huddle that they did not have time to prepare their report. I’ll gently remind them afterward that it is not acceptable to be unprepared for the huddle, and it usually doesn’t happen twice.

It’s nothing too revolutionary, but it at least ensures the staff pays a minimum amount of attention to the day ahead.

This is our 21st year with morning huddles. I could not imagine a day without one. One of the first things that comes to mind, are you giving your staff time to pull all of this information together? We have admin time set aside every day for chart review for the hygienist and the assistants, as well as for the front desk to get reports together to present each morning. No meeting can be productive without proper preparation. The other thought is you must inspect what you expect and give feedback as needed. The first time a staff member comes unprepared for a meeting, I would specifically let he/she know what I needed from him/her. I would ask if there is anything I could do to help he/she be prepared and then I would ask about being prepared for the next meeting. In your case, I would do this as a group. I’ve never had to go beyond this step. If I ever had to, it would result in writing the person up. If he/she continued to not perform, the staff member would be let go.

Bottom line it’s your party and you are paying the bill. The key is to catch these problems before you get angry. My wife calls it being confrontational dysfunctional.

On another note, we end our day with a quick wrap up. Each staff member just talks about one positive thing that happened during the day. Takes very little time and well worth the effort. ■ 

David Kimmel, DMD
dkimmel
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